

Oracle® Financial Services Lending and Leasing OAS Installation Guide



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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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Contents

Preface

Prerequisites	iv
Audience	v
Documentation Accessibility	v
Diversity and Inclusion	v
Conventions	v

1 Install OA Publisher

1.1 Installing OA Publisher	1-1
-----------------------------	-----

2 Configure OA Publisher

2.1 Configuring OA Publisher	2-1
2.2 Verifying Successful OA Publisher Deployment	2-9

3 Create OA Publisher Datasource

3.1 Creating OA Publisher Datasource	3-1
3.2 Creating Roles	3-5
3.2.1 Creating WebLogic Application Role	3-5
3.2.2 Creating WebLogic Application Policies	3-8

4 Import Reports to OA Publisher Server

4.1 Importing Reports to OA Publisher Server	4-1
--	-----

5 Configure MDB Mail Server

5.1 Configuring MDB Mail Server	5-1
---------------------------------	-----

Preface

This document contains notes and installation steps needed to install and Configure Oracle Analytics Publisher. Oracle Financial Services Lending and Leasing relies on this software to configure reports and this document is in no way meant to replace Oracle documentation supplied with this Oracle product or available via Oracle technical support. The purpose of this document is only meant to supplement the Oracle documentation and to provide Oracle Financial Services Lending and Leasing specific installation instructions.

For recommendations on security configuration, refer Security Configuration Guide.

Oracle Analytics Publisher installation consists of the following steps.

- [Installing OA Publisher](#)
- [Configuring OA Publisher](#)
- [Creating OA Publisher Datasource](#)
- [Importing Reports to OA Publisher Server](#)
- [Configuring MDB Mail Server](#)

This section consists of the following topics:

- [Prerequisites](#)
- [Audience](#)
- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Conventions](#)

Prerequisites

The following software are required to install Oracle Financial Services Lending and Leasing application and they are available from the following sources:

- Oracle Software Delivery Cloud (<http://edelivery.oracle.com/>)
- Oracle Technology Network (OTN)
 1. JDK Version 1.8.0_301 or above (<https://www.oracle.com/technetwork/java/javase/downloads/jdk8-downloads-2133151.html>)
 2. Oracle WebLogic Server 12c Version 12.2.1.4.0 (Fusion Middleware Infrastructure Installer) <http://www.oracle.com/technetwork/middleware/weblogic/downloads/wls-main-097127.html>
 3. The patches for Fusion Middleware 12.2.1.4.0 with the following patch number are to be applied - 30657796. However, this is required only for OAS Linux and can be ignored for OAS windows.

4. Oracle Analytic Server (OAS) 5.9.0 <http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>

 **Note:**

Please use all 64-bit software's for machine hosted with 64-bit O/S.

Audience

This document is intended for system administrators or application developers who are installing Oracle Financial Services Lending and Leasing Application.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Conventions

The following conventions are used in this document:

Table 1 Conventions used

Term	Refers to
Home Directory/ \$OFSSL_HOME	Oracle Financial Services Lending and Leasing Home Directory

1

Install OA Publisher

The following section explains the steps to install Oracle Analytics publisher.

- [Installing OA Publisher](#)

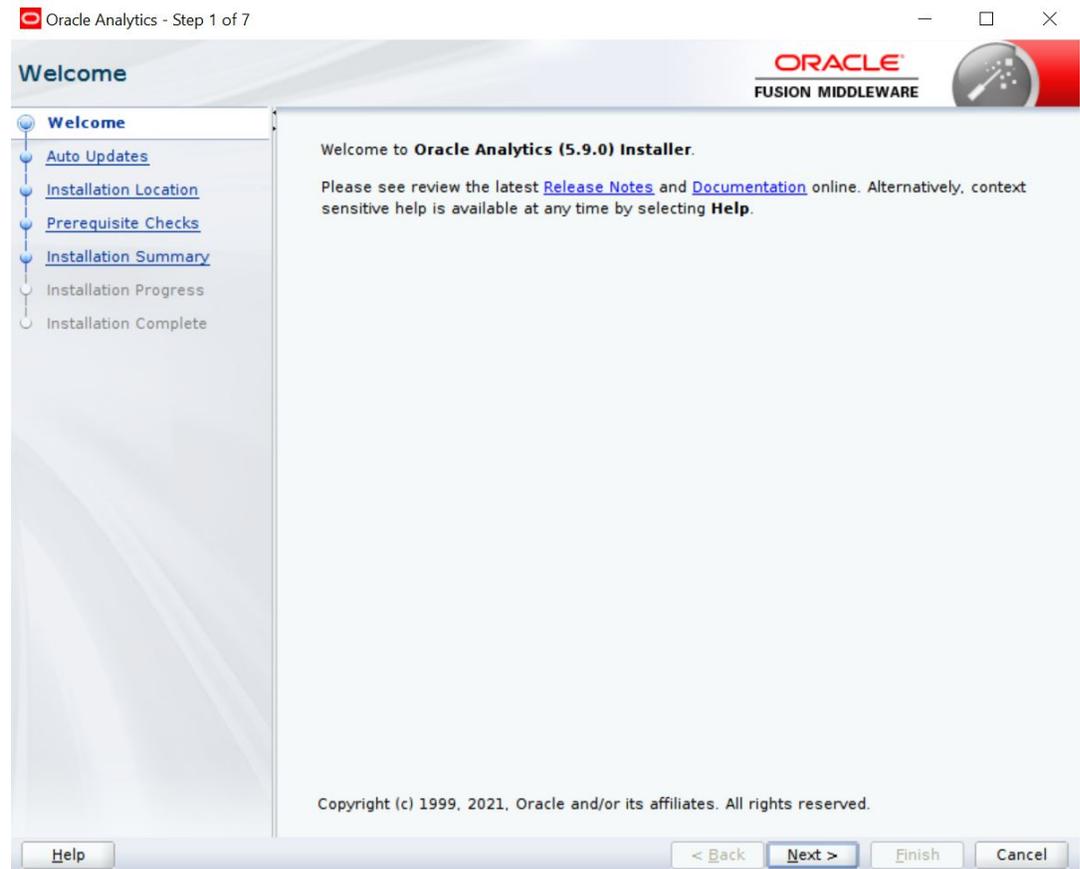
1.1 Installing OA Publisher

Follow the below steps to install Oracle Analytics publisher:

1. Download and unzip 'Oracle_Analytics_Server_Linux_5.9.0.zip'.
2. Navigate to .jar file location.
3. Run the command `java -jar Oracle_Analytics_Server_5.9.0.jar`

The following window is displayed.

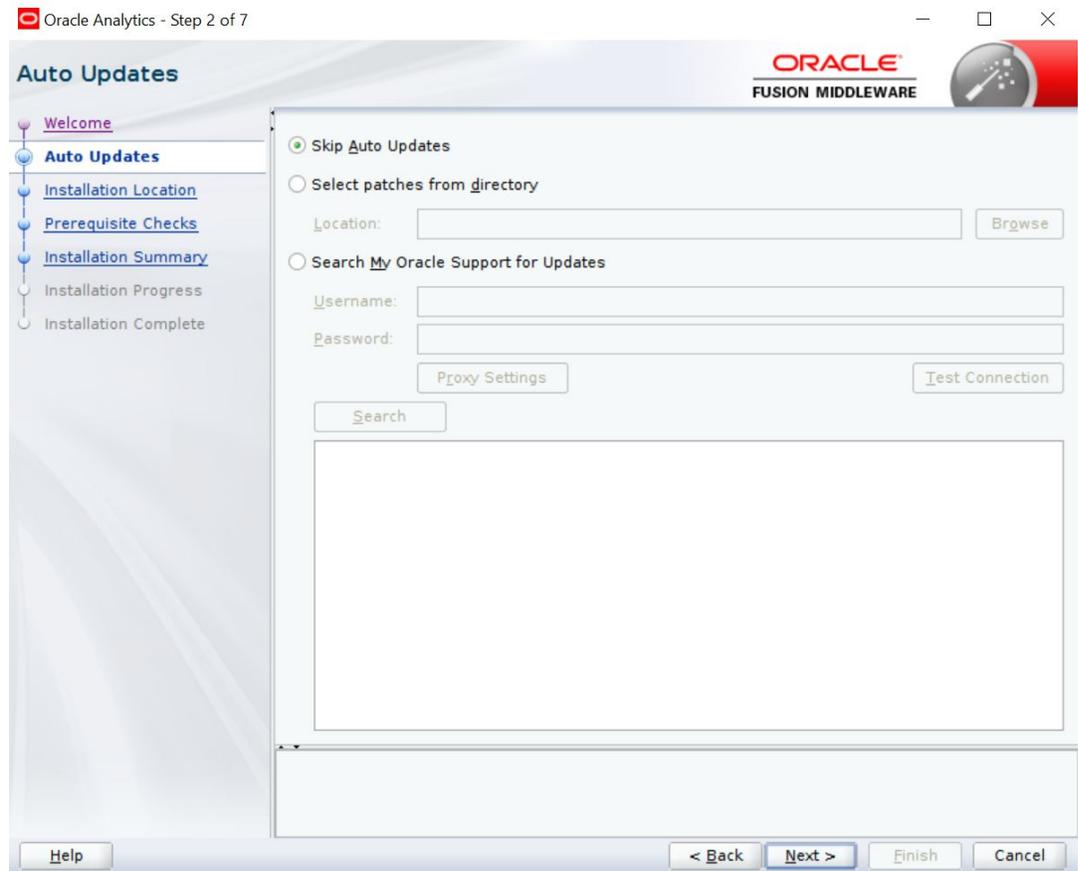
Figure 1-1 Oracle Analytics Installer window



4. Click **Next**.

The following window is displayed.

Figure 1-2 Auto Updates window

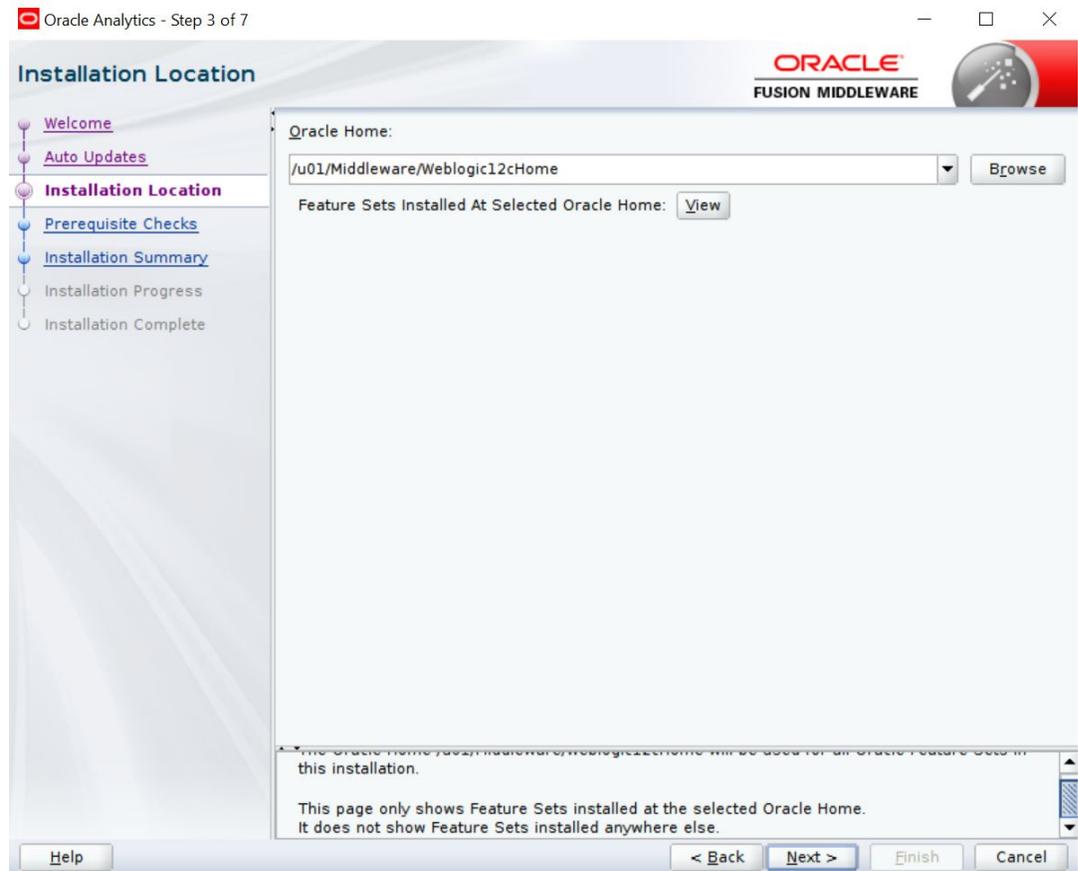


5. Select the option **Skip Software Updates**.

6. Click **Next**.

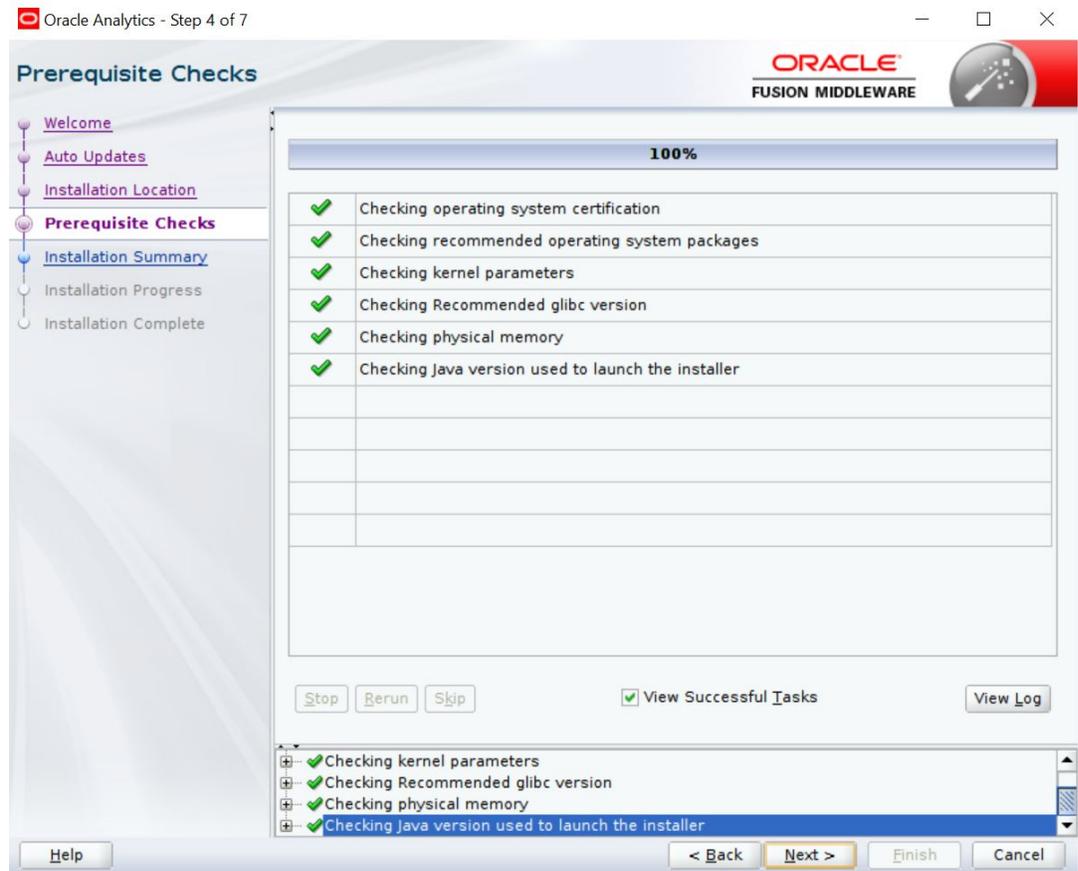
The following window is displayed.

Figure 1-3 Installation Location



7. Browse Oracle Middleware Home path
(for example /u01/Middleware/Weblogic12cHome) and click **Next**.
The following window is displayed.

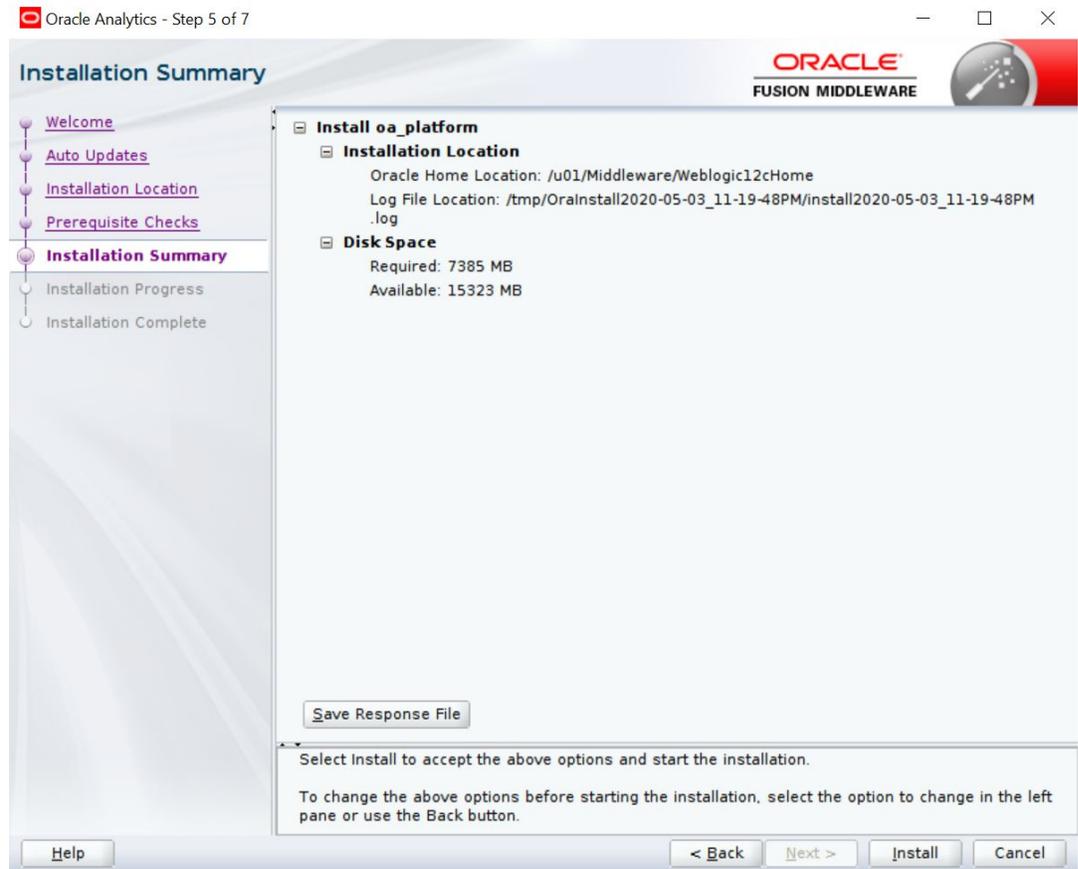
Figure 1-4 Prerequisite Check



8. Click **Next**.

The following window is displayed.

Figure 1-5 Installation Summary



9. Click **Install**.

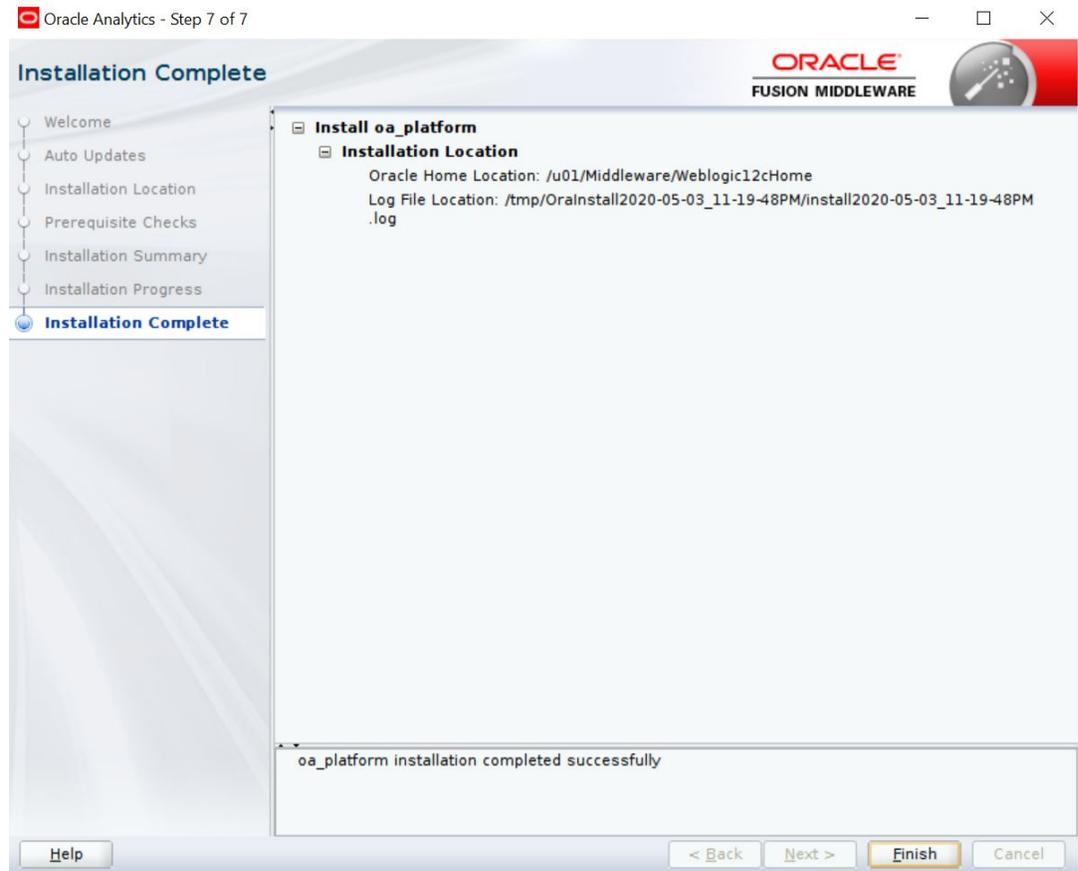
The following window is displayed.

Figure 1-6 Installation Progress



10. Click **Next**. Once the installation is complete click **Finish** to close.

Figure 1-7 Installation Complete



2

Configure OA Publisher

The following sections details the steps to configure OA Publisher.

- [Configuring OA Publisher](#)
- [Verifying Successful OA Publisher Deployment](#)

2.1 Configuring OA Publisher

After installing OA Publisher, the next step is to configure OA Publisher.

To configure OA Publisher

1. Launch configuration window and browse to `$BI_HOME/bin`
(for example, BI_HOME is `/u01/Middleware/Weblogic12cHome/bi`).
2. Run `./config.sh`.

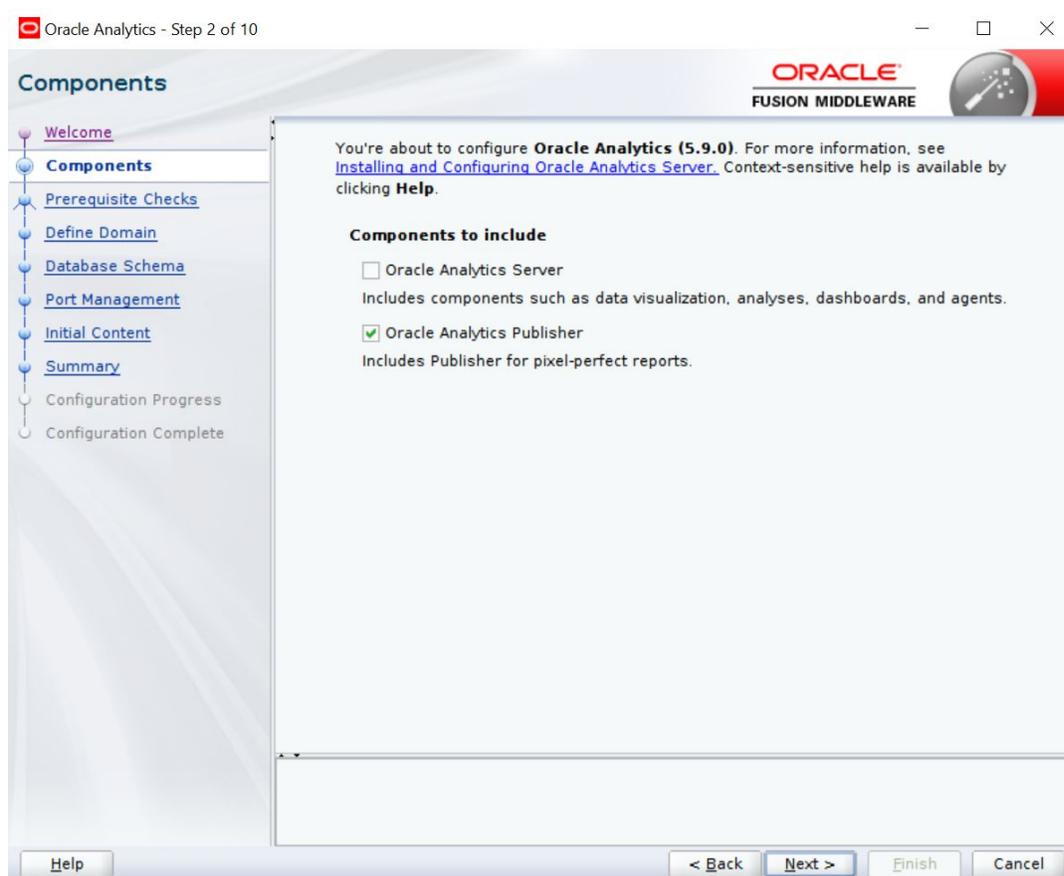
The following window is displayed.

Figure 2-1 Oracle Analytics Configuration Assistant window



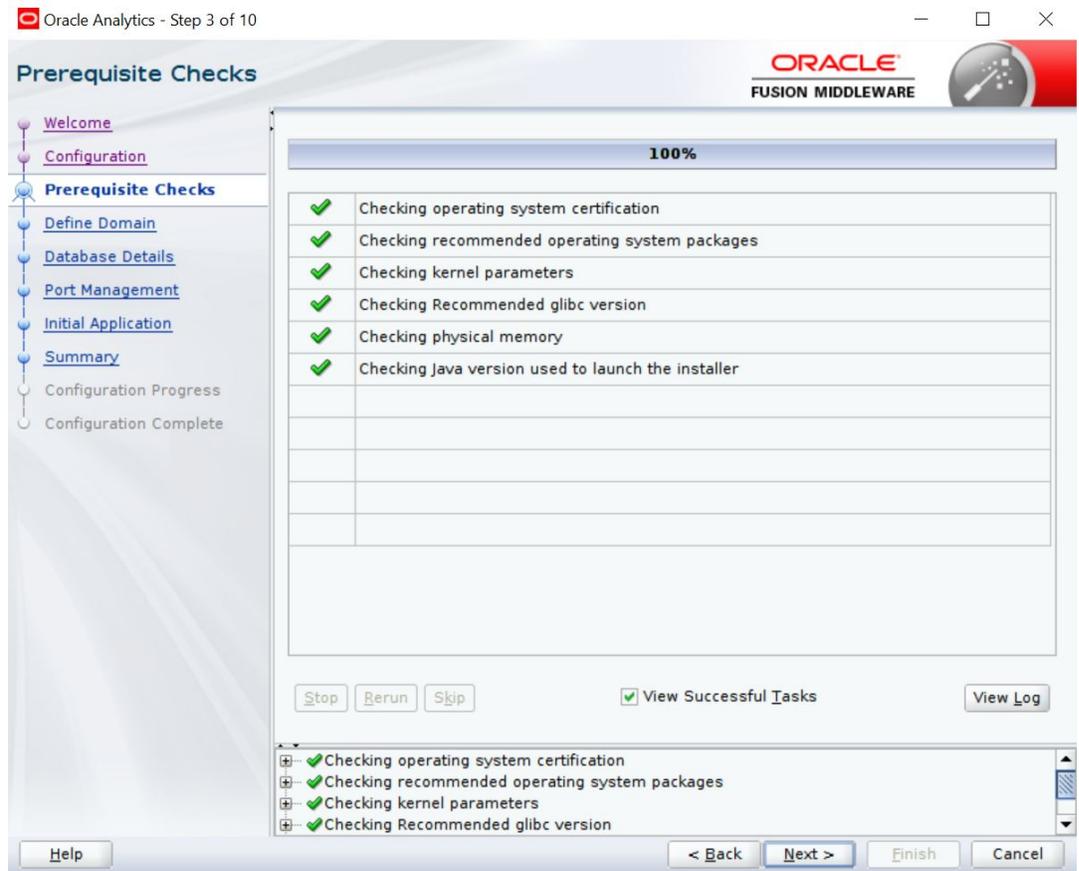
3. Select the option **Oracle Analytics Publisher** and Click **Next**.

Figure 2-2 Configuration



4. Click **Next**.
The following window is displayed.

Figure 2-3 Prerequisite Checks



5. Enter the User Name, Password and Domain Name for OA Publisher domain. Click **Next**. The following window is displayed.

Figure 2-4 Define Domain

Oracle Analytics - Step 4 of 10

Define Domain

ORACLE
FUSION MIDDLEWARE

Welcome
Configuration
Prerequisite Checks
Define Domain
Database Details
Port Management
Initial Application
Summary
Configuration Progress
Configuration Complete

The domain is the basic unit of WebLogic administration. All Oracle Analytics components reside in one domain. The domain needs a place to store files, and initial administrator credentials.

The domain files include configuration files, log files, and data files.

The credentials define the initial administrator account. For security reasons no other default accounts are created. Use this initial account to create individual accounts for your users.

Location of new domain

Domains Directory

Domain Name

Domain Home

Credentials for new domain

Username

Password

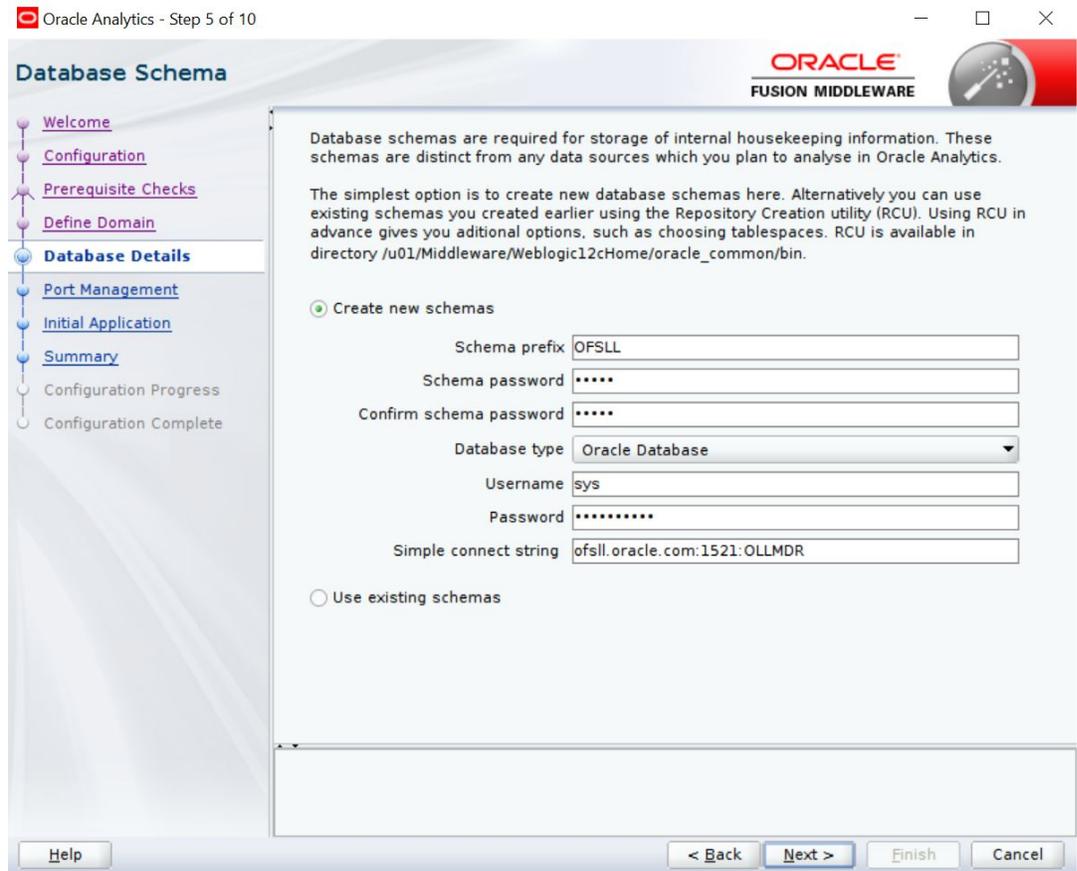
Confirm Password

Enter a password for the System Administrator.
The password must be a minimum of 8 and not exceed 30 alphanumeric characters. It must begin with an alphabetic character, use only alphanumeric, underscore (_), dollar (\$) or pound (#) characters and include at least 1 digit.

6. Select the option **Create New Schema** and specify the Schema prefix, Schema password, database type, user name, password, simple connect string.
7. Click **Next**.

The following window is displayed.

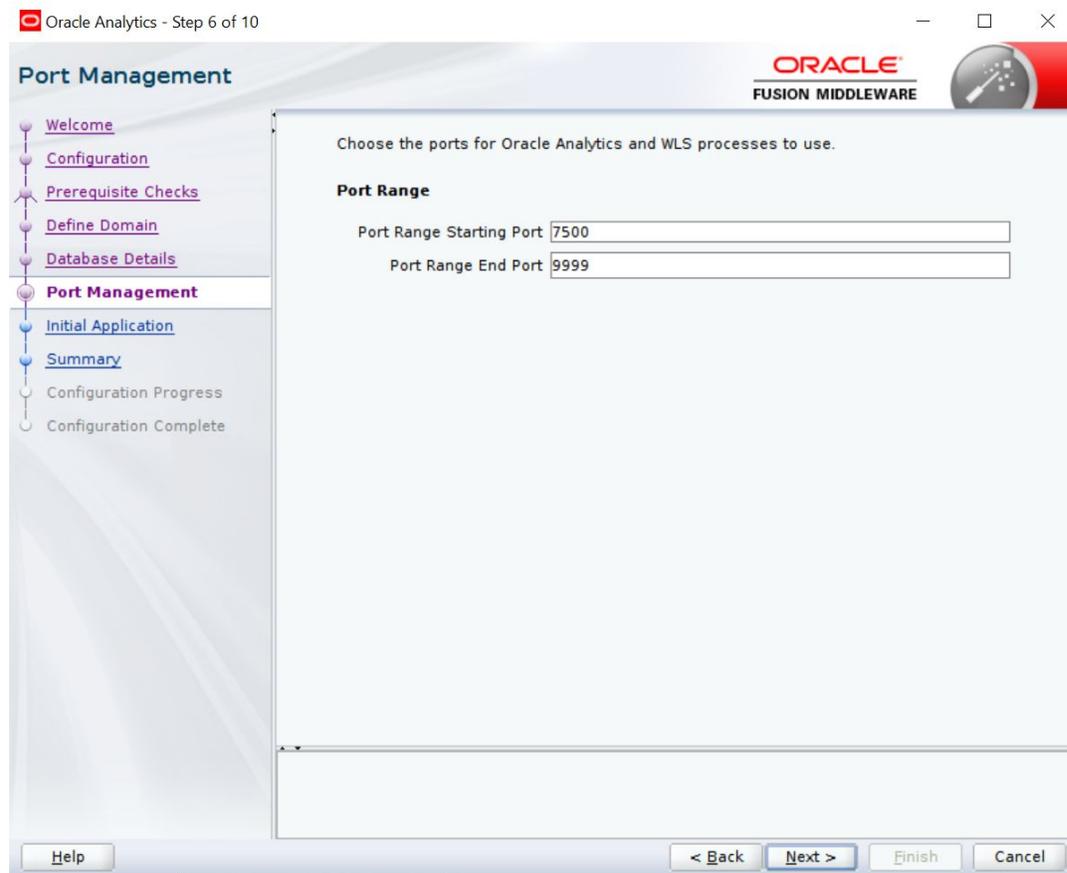
Figure 2-5 Database details



8. Click **Next**.

The following window is displayed.

Figure 2-6 Port Management



9. Click **Next**.

The following window is displayed.

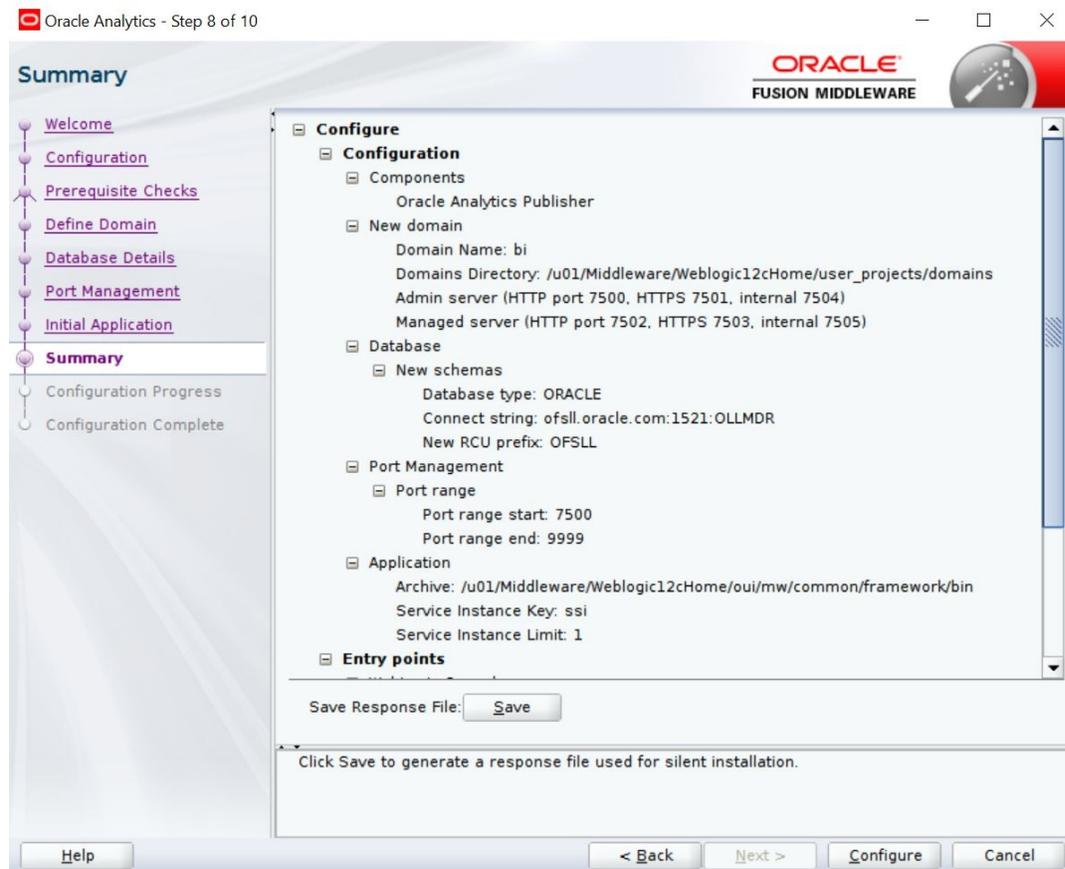
Figure 2-7 Initial Application



10. Click **Configure**.

The following window is displayed.

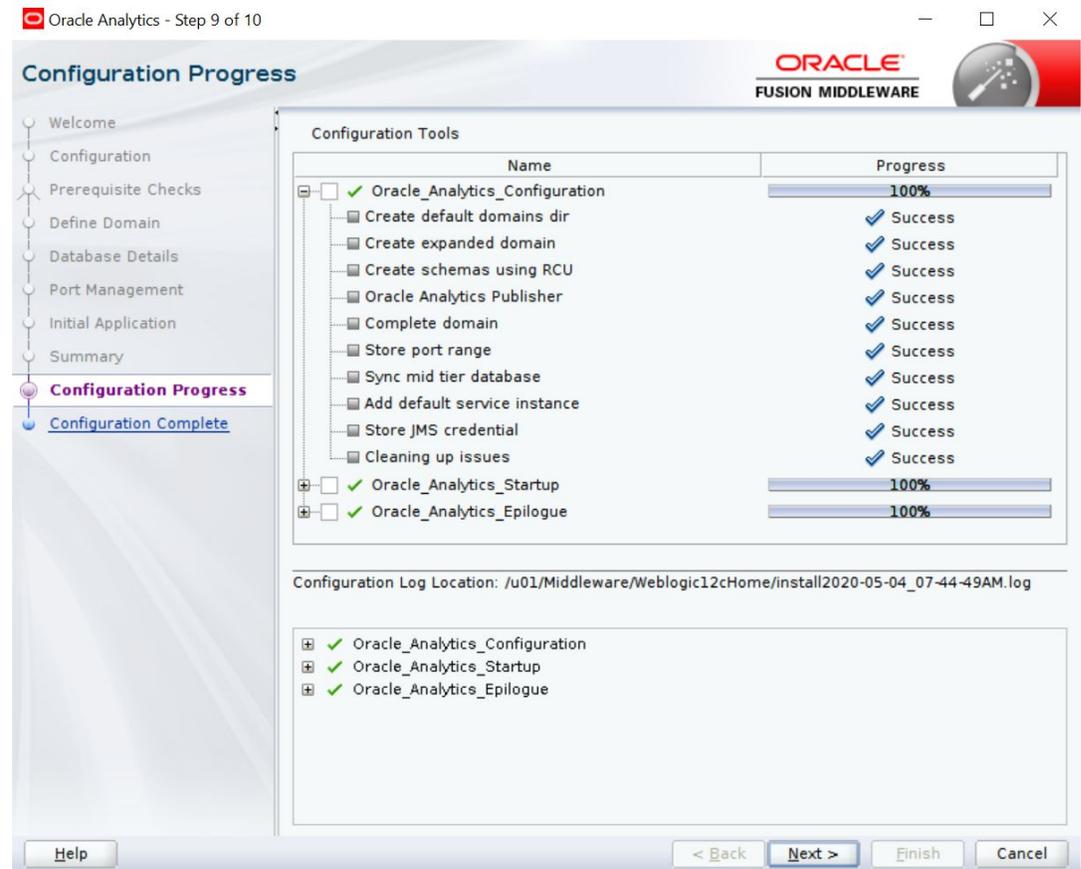
Figure 2-8 Summary



11. Click **Next**.

The following window is displayed .

Figure 2-9 Configuration Progress



12. Click **Save** and save the Response File.
13. Click **Finish**. The application will create a new domain for OA Publisher with the details as highlighted in the above screen.

2.2 Verifying Successful OA Publisher Deployment

Successful OA Publisher deployment can be verified by launching the OA Publisher URL
<http://hostname:<port>/xmlpserver> .

3

Create OA Publisher Datasource

The following sections details the steps to be followed to create OA Publisher Datasource.

- [Creating OA Publisher Datasource](#)
- [Creating Roles](#)

3.1 Creating OA Publisher Datasource

To create OA Publisher Datasource, do the following:

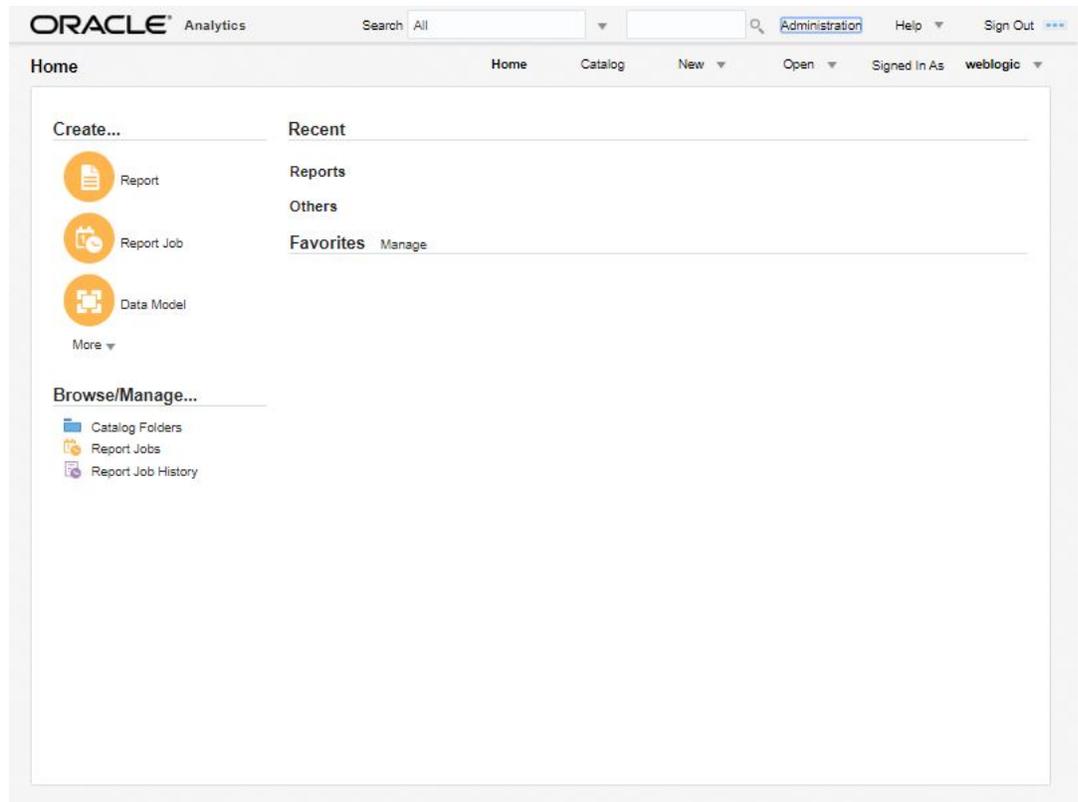
1. Access the console URL using `http://hostname:<port>/xmlpserver`.

Figure 3-1 Sign in page

The screenshot displays the Oracle Analytics sign-in interface. At the top left, the Oracle logo and 'Analytics' text are visible. The central focus is a white-bordered box containing the sign-in form. The form is titled 'Sign In' and includes the instruction 'Please enter username and password'. It features two input fields: 'Username' and 'Password'. Below these fields is an 'Accessibility Mode' checkbox and a 'Sign In' button. At the bottom of the form is a language selection dropdown menu currently set to 'English (United States)'. The footer of the page contains the text: 'Copyright © 2003, 2017, Oracle and/or its affiliates. All rights reserved.'

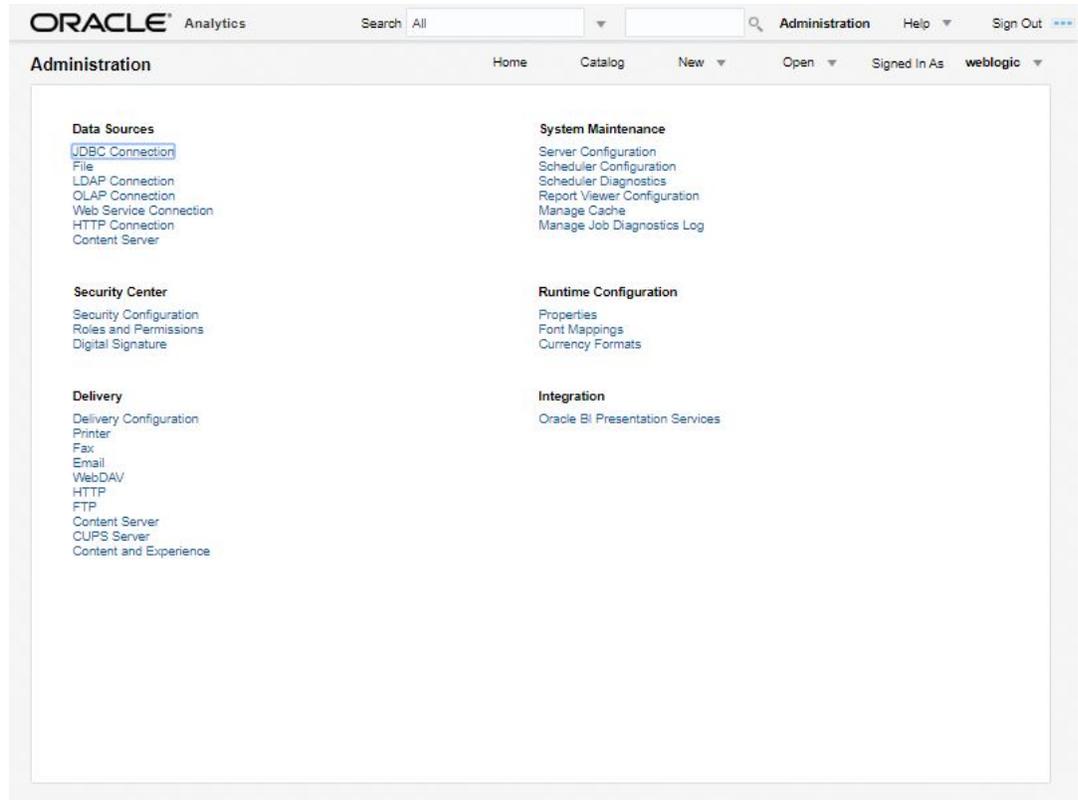
2. The following window is displayed. Click Administration option on the header.

Figure 3-2 Home page



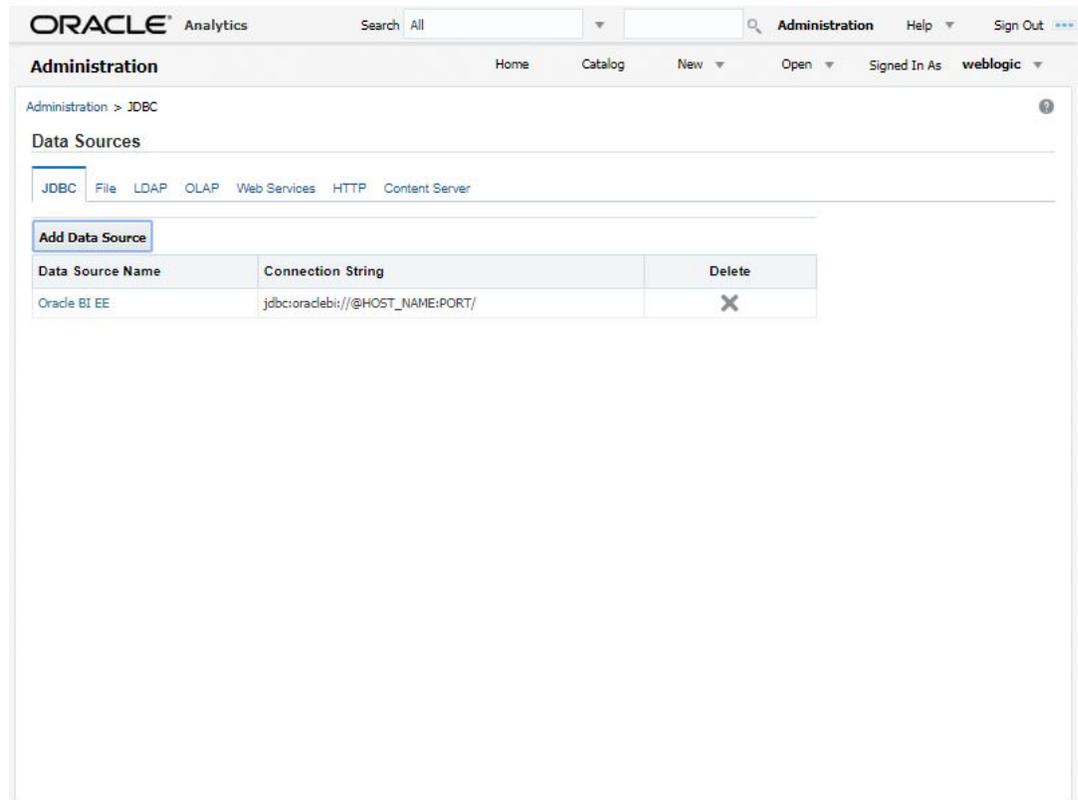
3. Click on **JDBC Connection**.

Figure 3-3 Administration page



4. Click **Add Data Source**.

Figure 3-4 JDBC page



5. Add the following details:
 - Specify Data Source Name as **FLLReportsPool**.
 - Click on **Test Connection**.
 - Under **Security** section, select **BI Author Role** and **BI Consumer Role** from Available Roles and assign them as Allowed Roles.

 **Note:**

If “BI Author” and “BI Consumer” roles are not displayed in the ‘Available Roles’ section, you need to create the roles as explained in following ‘Creating Roles’ section

Figure 3-5 Details page

The screenshot shows the Oracle Analytics Administration console. The top navigation bar includes 'ORACLE Analytics', a search bar, and links for 'Administration', 'Help', and 'Sign Out'. Below this is a secondary navigation bar with 'Home', 'Catalog', 'New', 'Open', 'Signed In As', and 'weblogic'. The main content area is titled 'Administration' and contains a 'General' section. This section includes three tips: 'Please make sure to install the required JDBC driver classes.', 'With Oracle Fusion Middleware Security Model, select the Use System User checkbox to use the BI System User for your BI Server Database Connection.', and 'Not all JDBC data sources support Data Gateway'. The configuration fields are: '* Data Source Name' (FLLReportsPool), '* Driver Type' (Oracle 12c), '* Database Driver Class' (oracle.jdbc.OracleDriver), '* Connection String' (jdbc:oracle:thin:@ofell.oracle.com:1521/OLLDB), 'Use System User' (checkbox), '* Username' (OFSSLREL), 'Password' (masked), 'Pre Process Function', 'Post Process Function', 'Client Certificate', and 'Use Proxy Authentication' (checkbox). A 'Test Connection' button is located below these fields. Below the 'General' section is a 'Backup Data Source' section with a tip: 'To enable access to a backup data source, please check the Use Backup Data Source checkbox and enter the necessary connection information.' This section includes 'Use Backup Data Source' (checkbox), 'Connection String', 'Username', 'Password', and a 'Test Connection' button.

6. Click **Apply**.

3.2 Creating Roles

The following sections details the steps to be followed to create “BI Author” and “BI Consumer” roles which are used to define security roles while creating Data Source on OA Publisher.

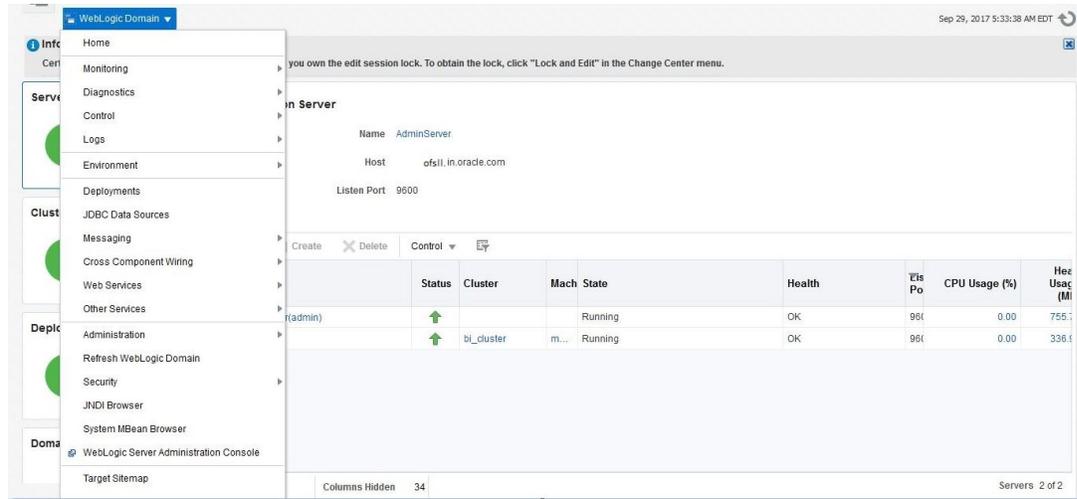
- [Creating WebLogic Application Role](#)
- [Creating WebLogic Application Policies](#)

3.2.1 Creating WebLogic Application Role

To create WebLogic Application Role

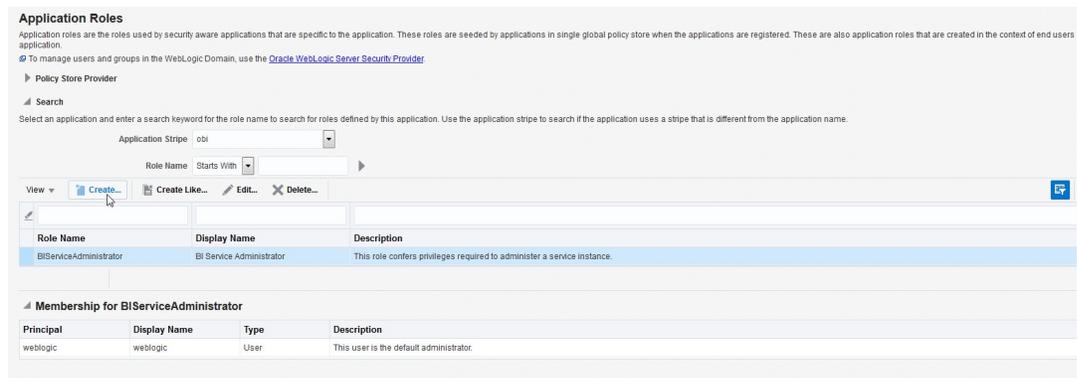
1. Login to Enterprise Manager using the URL - `http://hostname:port/em`.
2. Select Weblogic Domain > Security > Application Roles as indicated in the following screen.

Figure 3-6 WebLogic Application Role 1



- In the Application Stripe field, select **obi** from the drop-down list. The option **OAServiceAdministrator** is added by default. Click **Create**.

Figure 3-7 WebLogic Application Role 2



- Specify the following details:
 - Role Name
 - Display Name
 - Description

Figure 3-8 WebLogic Application Role 3



- Click **Add** to add the application role to the members family. The same can later be mapped to required Users or Groups defined in Enterprise LDAP server, or the role can be mapped to other application roles.

Figure 3-9 WebLogic Application Role 4

Create Application Role
Role (or Enterprise Role) is the group of users designed at the enterprise level and typically used to assign a privilege or permission. A role can also contain other roles as members.

General

Add Principal
Specify criteria to search and select the application roles that you want to grant permissions to.

Search

Type: User

Principal Name Starts With: []

Display Name Starts With: []

Searched Principals

Principal	Display Name	Description
LCMUser		This is the default service account for WebLogic Server Lifecycle Manager configuration updates.
OracleSystemUser		Oracle application software system user.
weblogic		This user is the default administrator.

Advanced Option
 Check to enter principal name here instead of searching from above. This option can be used for advanced scenarios related to custom authenticators.

- Add the Weblogic User by selecting **weblogic** in the **Searched Principals** section and click **OK**. The Weblogic User is added to the application role.

Figure 3-10 WebLogic Application Role 5

Create Application Role
Role (or Enterprise Role) is the group of users designed at the enterprise level and typically used to assign a privilege or permission. A role can also contain other roles as members.

General

Application Stripe: obi

Role Name: BIConsumer

Display Name: BIConsumer

Description: The base-level role that grants the user access to existing analyses, dashboards and agents, allows them to run or schedule existing BI Publisher reports, but not create any new ones.

Members
An application role may need to be mapped to users or groups defined in enterprise LDAP server, or the role can be mapped to other application roles.

Name	Display Name	Type
weblogic		User

- Click **OK**. The new role is added to the list of application roles.

Figure 3-11 WebLogic Application Role 6

Application Roles
Application roles are the roles used by security aware applications that are specific to the application. These roles are seeded by applications in single global policy store when the applications are registered. These are also application roles that are created in the context of end users accessing the application.

Policy Store Provider

Search

Select an application and enter a search keyword for the role name to search for roles defined by this application. Use the application stripe to search if the application uses a stripe that is different from the application name.

Application Stripe: obi

Role Name Starts With: []

Role Name	Display Name	Description
BIServiceAdministrator	BI Service Administrator	This role confers privileges required to administer a service instance.
BIConsumer	BIConsumer	The base-level role that grants the user access to existing analyses, dashboards and agents, allows them to run or schedule existing BI Publisher reports, but not create any new ones.

Membership for BIServiceAdministrator

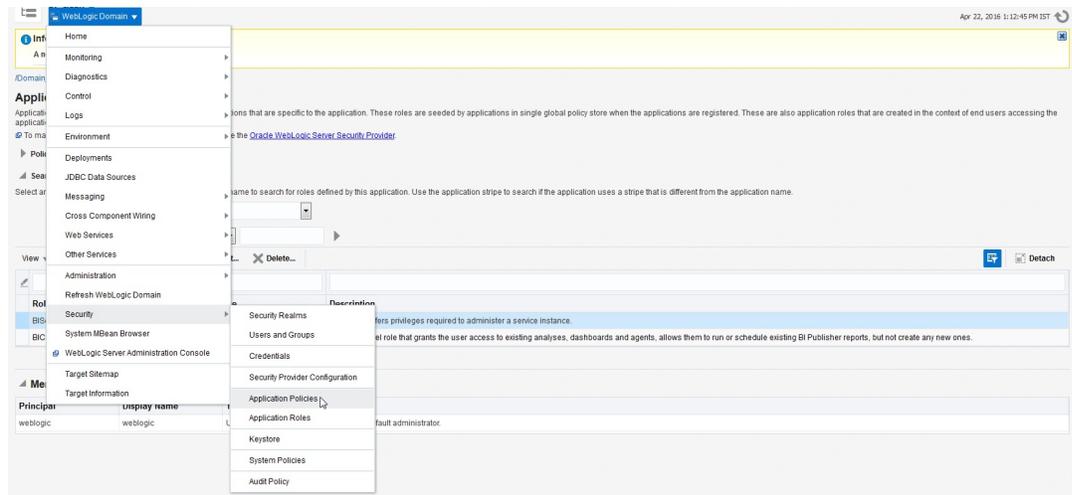
Principal	Display Name	Type	Description
weblogic	weblogic	User	This user is the default administrator.

3.2.2 Creating WebLogic Application Policies

To Create WebLogic Application Policies

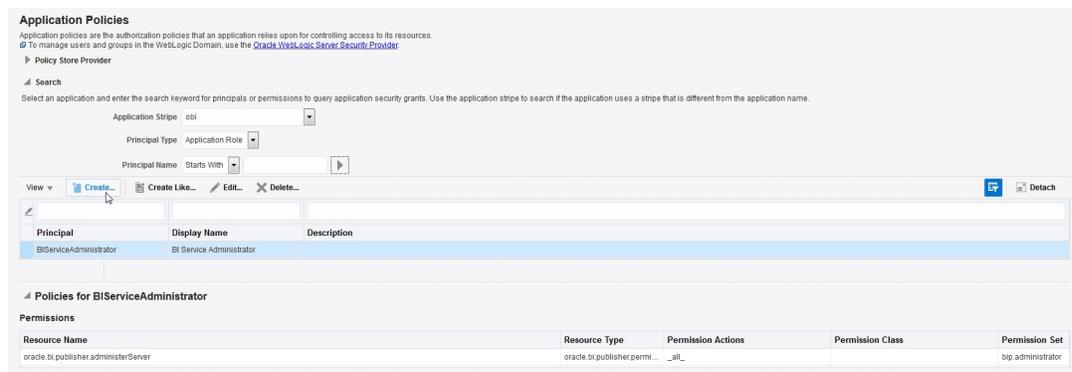
1. Login to Enterprise Manager using the URL - `http://hostname:port/em`.
2. Select Weblogic Domain > Security > Application Policies as indicated in the following screen:

Figure 3-12 WebLogic Application Policies 1



3. In the Application Stripe field, select **obi** from the drop-down list. Click **Create**.

Figure 3-13 WebLogic Application Policies 2



4. In **Create Application Grant** screen, under the Grantee section, click **Add**.

Figure 3-14 WebLogic Application Policies 3

Create Application Grant
For managing an application policy, select a particular grantee and attach a permission to it.

Application Stripe obi

Grantee
Select the grantees (user, group or application role) you want to add to the policy.

View

Name	Display Name	Type	Description
No users or groups added.			

Permissions
Select from permissions and resources used in this application. Enter search criteria to search for right permissions.

View

Permission Class	Resource Name	Re Permission Ty Actions	Permission Set
No permissions added.			

5. Select the newly created application role from the list and click **OK**. The new role is added to the list.

Figure 3-15 WebLogic Application Policies 4

Create Application Grant
For managing an application policy, select a particular grantee and attach a permission to it.

Application Stripe obi

Grantee
Select the grantees (user, group or application role) you want to add to the policy.

View

Name	Display Name	Type	Description
No users or groups added.			

Permissions
Select from permissions and resources used in this application. Enter search criteria to search for right permissions.

View

Permission Class	Resource Name	Re Permission Ty Actions	Permission Set
No permissions added.			

Add Principal
Specify criteria to search and select the application roles that you want to grant permissions to.

Search

Type: Application Role

Principal Name:

Display Name:

Searched Principals

Principal	Display Name	Description
anonymous-role	Anonymous Role	
authenticated-role	Authenticated Role	
BIConsumer	BIConsumer	The base-level role that grants the user access to existing analyses, dashboards and agents, allows them to run or schedule existing BI Publisher reports, but not create any new ones.
BIServiceAdministrator	BI Service Administrator	This role confers privileges required to administer a service instance.

6. In the **Permissions** section, click **Add**.

Figure 3-16 WebLogic Application Policies 5

Create Application Grant
For managing an application policy, select a particular grantee and attach a permission to it.

Application Stripe obi

Grantee
Select the grantees (user, group or application role) you want to add to the policy.

View

Name	Display Name	Type	Description
BIConsumer	BIConsumer	Application Role	The base-level role that grants the user access to existing analyses, dashboards and agents, allows them to run or schedule existing BI Publisher reports, but not create any new ones.

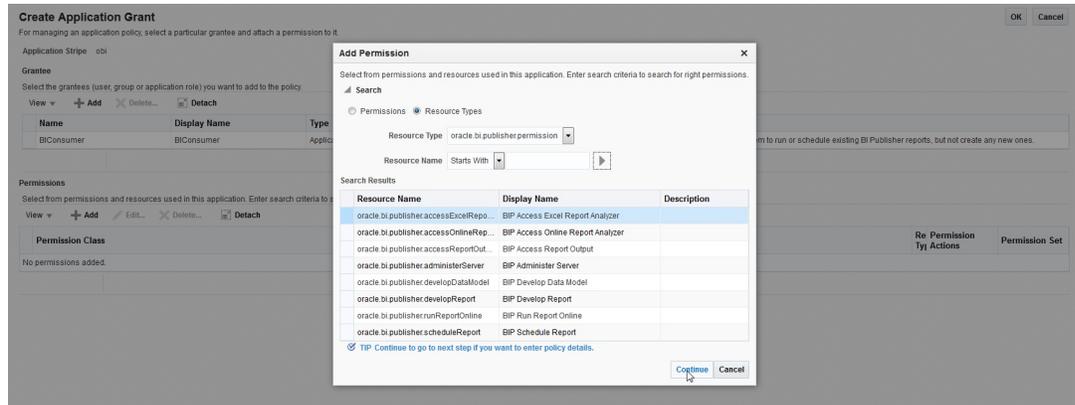
Permissions
Select from permissions and resources used in this application. Enter search criteria to search for right permissions.

View

Permission Class	Resource Name	Re Permission Ty Actions	Permission Set
No permissions added.			

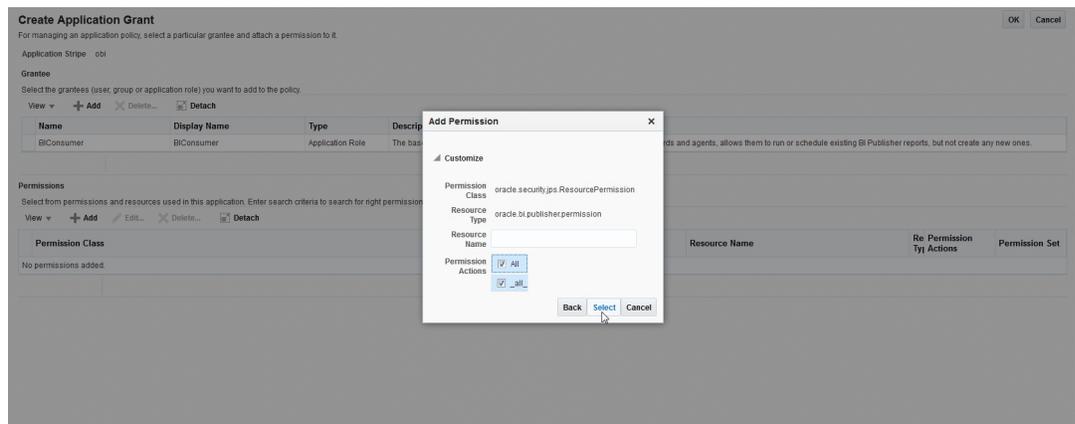
7. In the search criteria, select **Resource Type** and select the resource type from the drop-down list. Select the required resource from the search results and click **Continue**.

Figure 3-17 WebLogic Application Policies 6



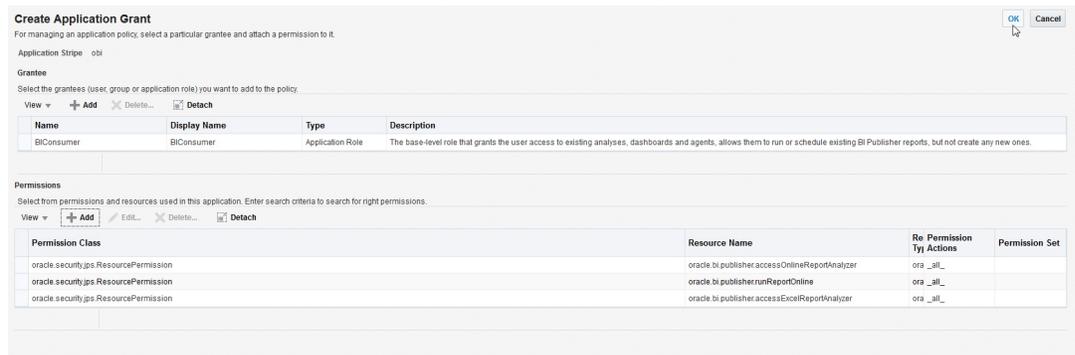
8. Define the required permission(s) for the application role by selecting the appropriate Permission Class and Permissions Actions check box. Click **Select**.

Figure 3-18 WebLogic Application Policies 7



9. The selected permissions are defined to the application role. Similarly you can define the required permissions for other application roles.

Figure 3-19 WebLogic Application Policies 8



10. Once done, click **OK**.

Figure 3-20 WebLogic Application Policies 9

Application Policies
 Application policies are the authorization policies that an application relies upon for controlling access to its resources.
 To manage users and groups in the WebLogic Domain, use the [Oracle WebLogic Server Security Provider](#).

Policy Store Provider

Search
 Select an application and enter the search keyword for principals or permissions to query application security grants. Use the application stripe to search if the application uses a stripe that is different from the application name.

Application Stripe:

Principal Type:

Principal Name:

View

Principal	Display Name	Description
BIconsumer	BIconsumer	
BIServiceAdministrator	BI Service Administrator	

Policies for BIconsumer

Permissions

Resource Name	Resource Type	Permission Actions	Permission Class	Permission Set
oracle.bi.publisher.runReportOnline	oracle.bi.publisher.permi...	_all_	oracle.security.jps.ResourcePermission	
oracle.bi.publisher.accessOnlineReportAnalyzer	oracle.bi.publisher.permi...	_all_	oracle.security.jps.ResourcePermission	
oracle.bi.publisher.accessExcelReportAnalyzer	oracle.bi.publisher.permi...	_all_	oracle.security.jps.ResourcePermission	

4

Import Reports to OA Publisher Server

The following section details how to import ofsl application reports to OA Publisher Server.

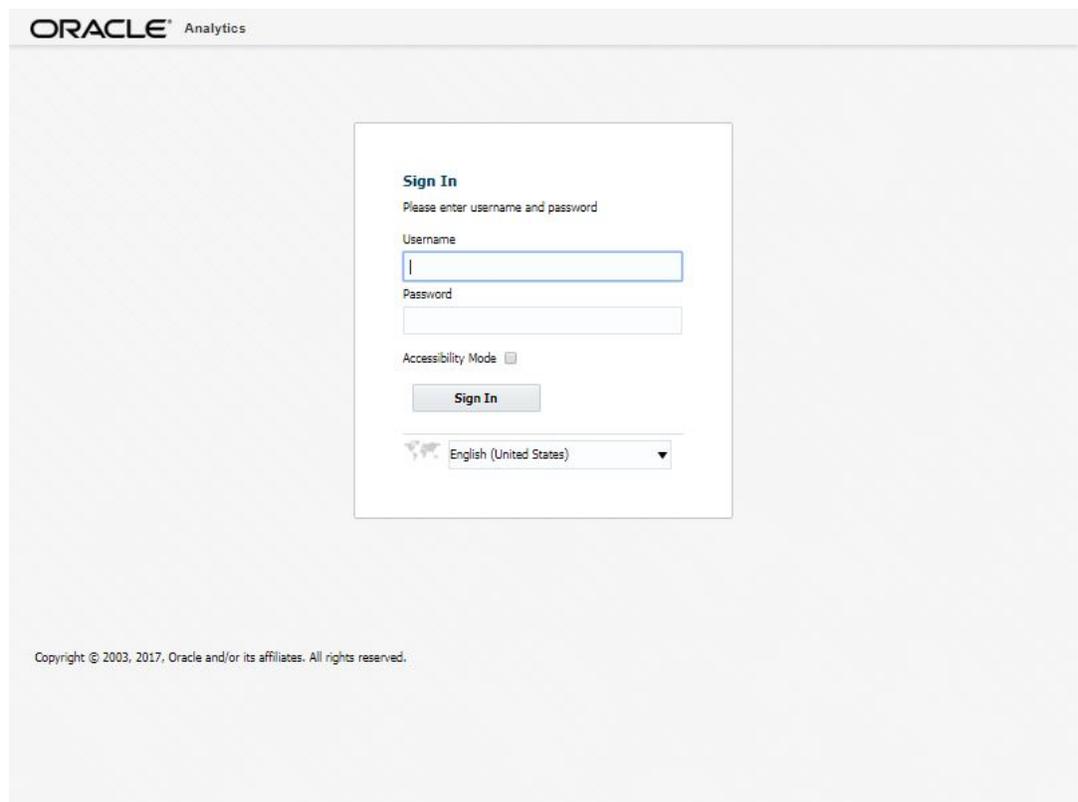
- [Importing Reports to OA Publisher Server](#)

4.1 Importing Reports to OA Publisher Server

To import ofsl application reports to OA Publisher Server, do the following:

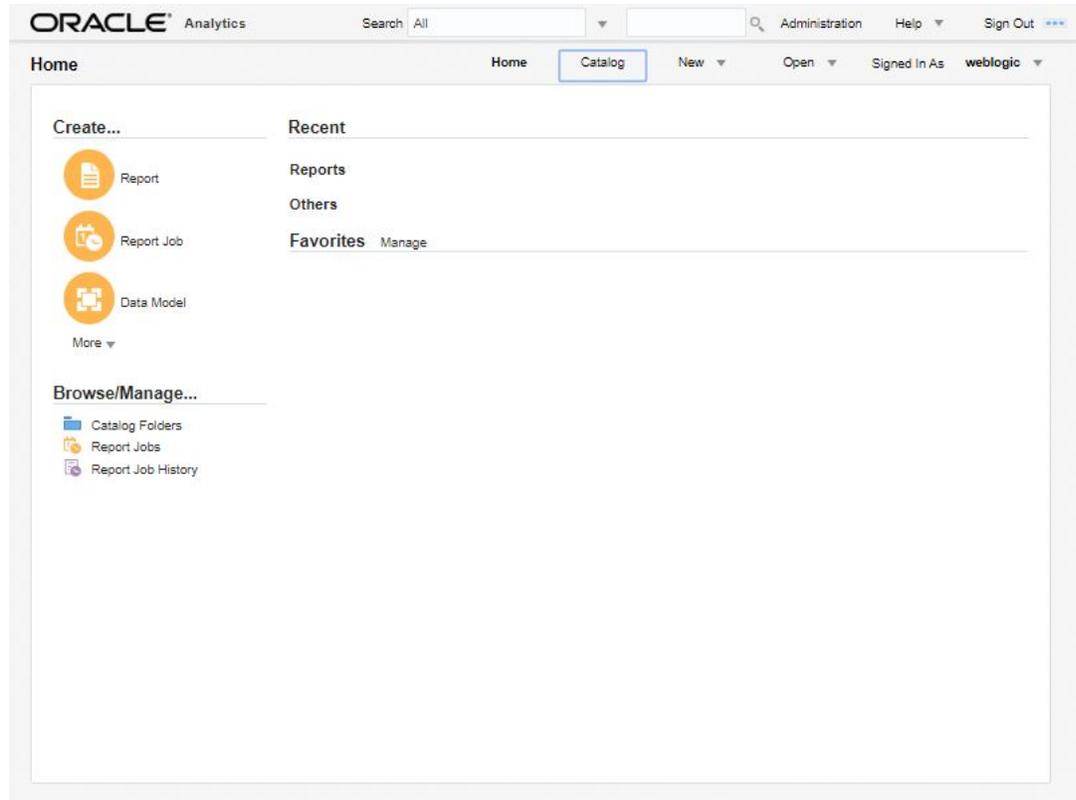
1. Copy and extract the OFSLLReports.zip file to staging area.
2. Launch the Oracle Analytics Intelligence Publisher Application using `http://hostname:port/xmlpserver`.
3. Login with valid credentials.

Figure 4-1 OA Publisher Server 1



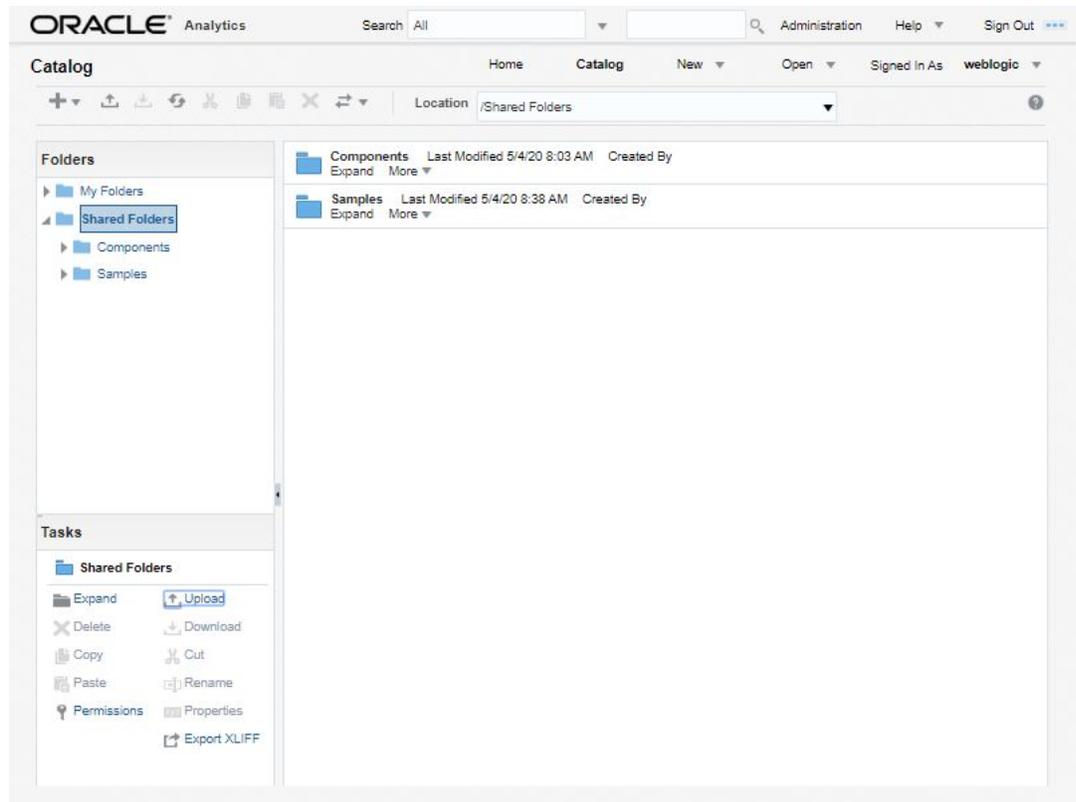
4. Following window is displayed. Click on **Catalog Folders** on the left pane.

Figure 4-2 OA Publisher Server 2



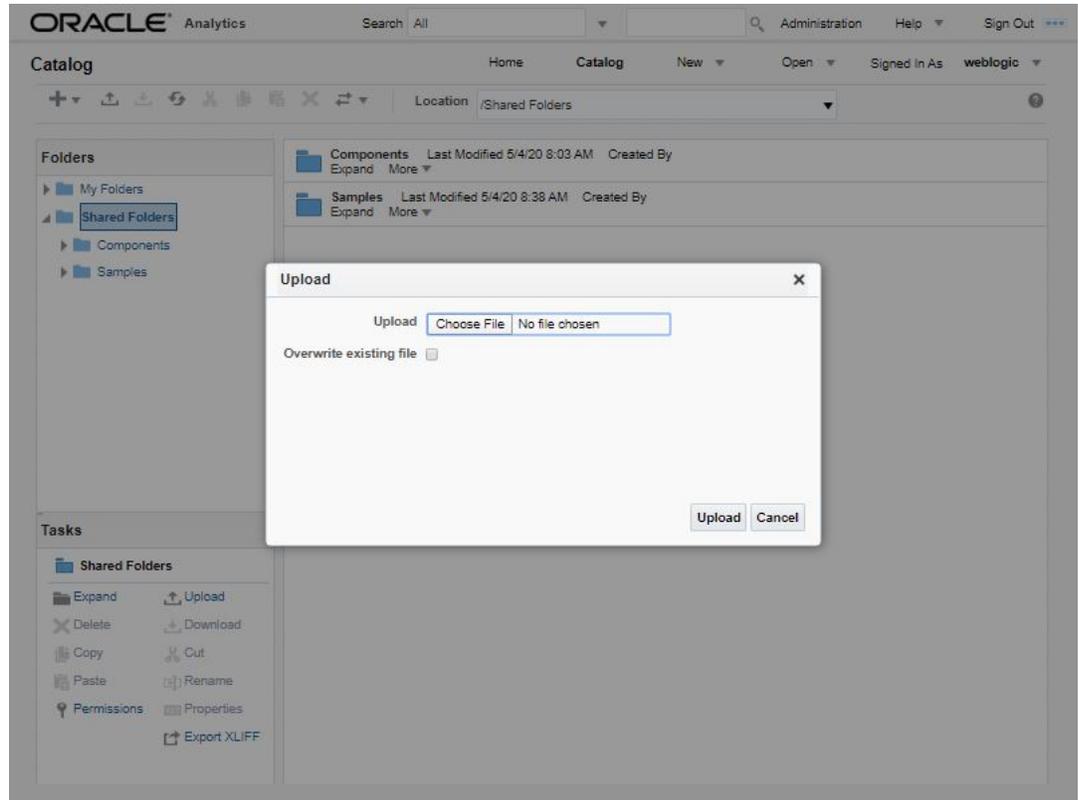
5. Click on **Shared Folders** option and then click **Upload**.

Figure 4-3 OA Publisher Server 3



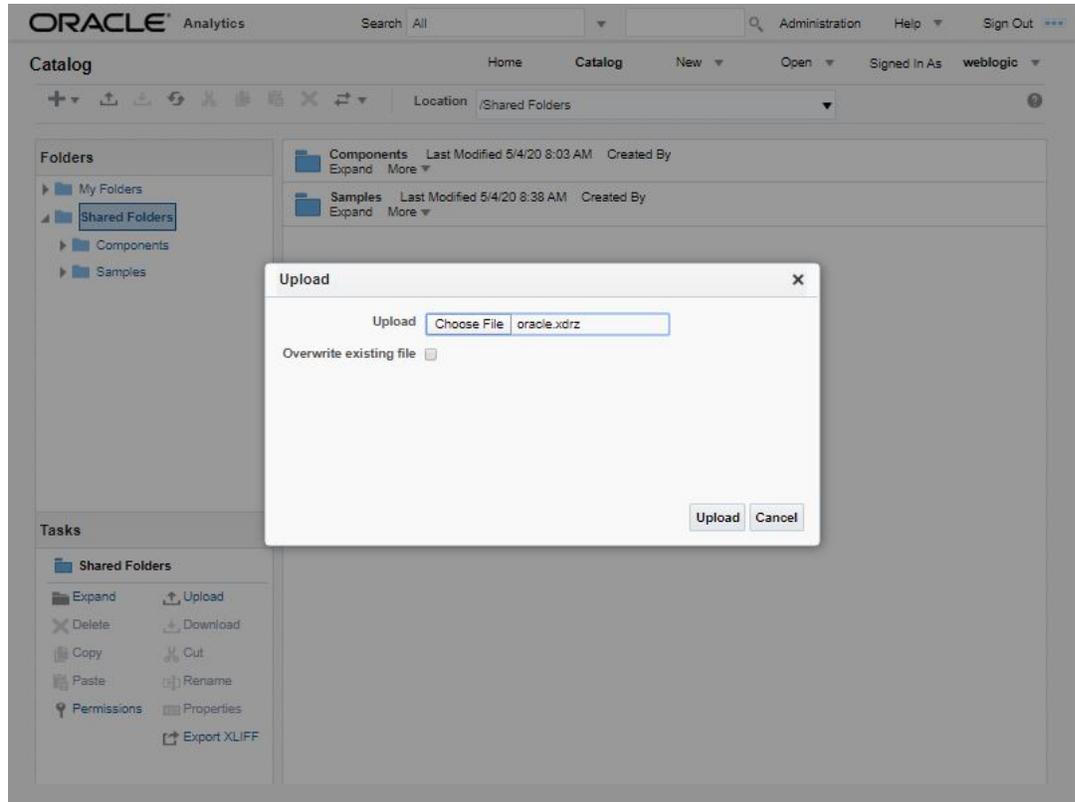
6. The following window is displayed. Browse to the location where the `oracle.xdrz` file is saved. Click the **Overwrite Existing File** check box if you are overwriting an existing directory.

Figure 4-4 OA Publisher Server 4



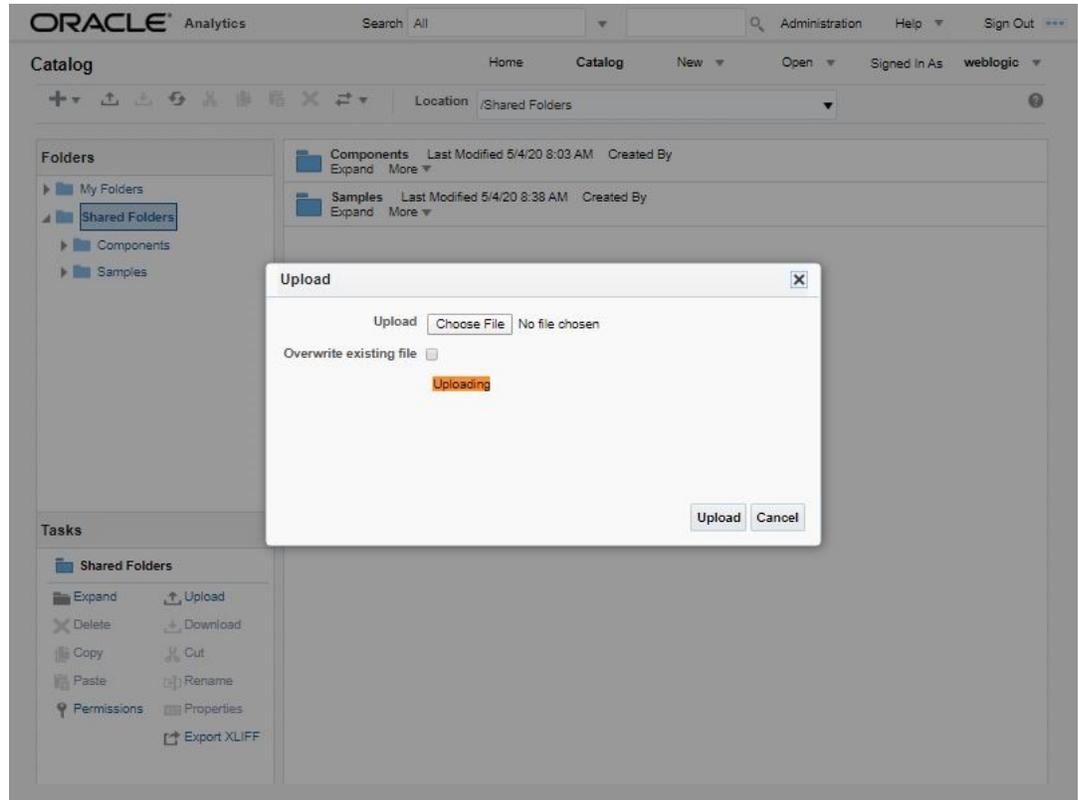
7. Click on **Upload**.

Figure 4-5 OA Publisher Server 5



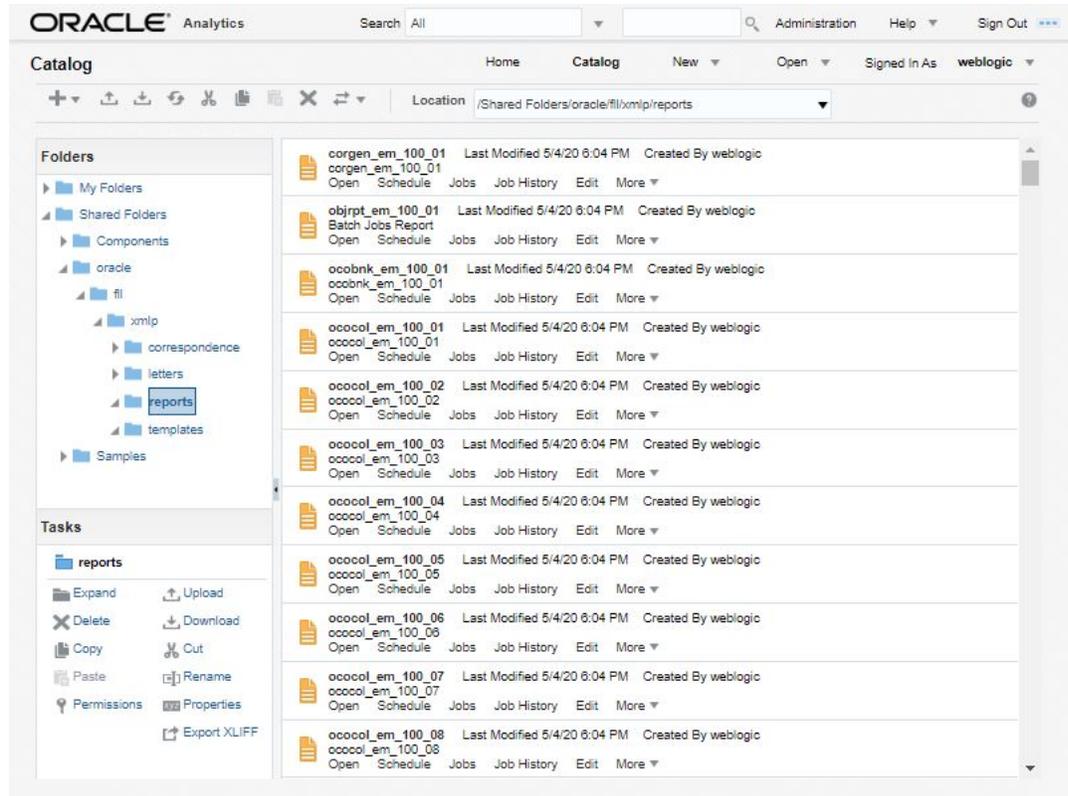
8. The following window is displayed.

Figure 4-6 OA Publisher Server 6



9. Once the upload is completed, click any folder to see the list of reports under the directory. The following window is displayed.

Figure 4-7 OA Publisher Server 7



5

Configure MDB Mail Server

The following section details the steps to configure the MDB (Message Driven Bean) email server.

- [Configuring MDB Mail Server](#)

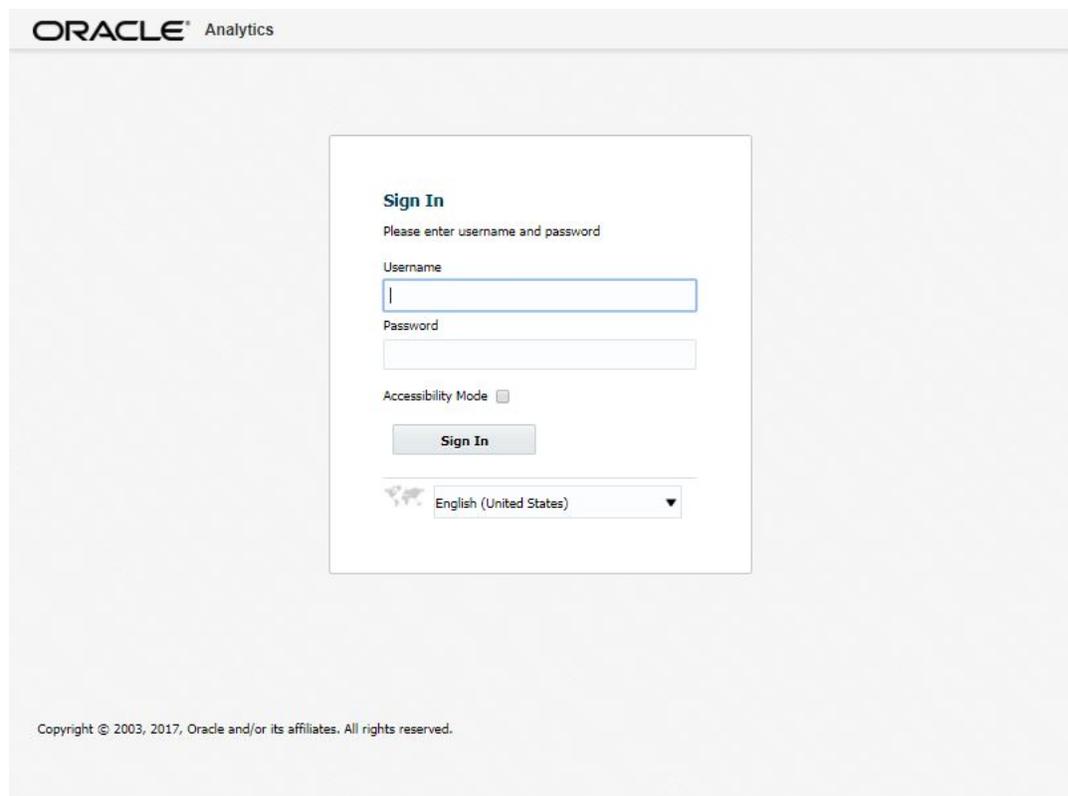
5.1 Configuring MDB Mail Server

Refer to the following instructions to configure the MDB email server. This is required for outbound email communications.

1. Launch the Oracle Analytics Publisher application (<http://hostname:port/xmlpserver>).

The following window is displayed.

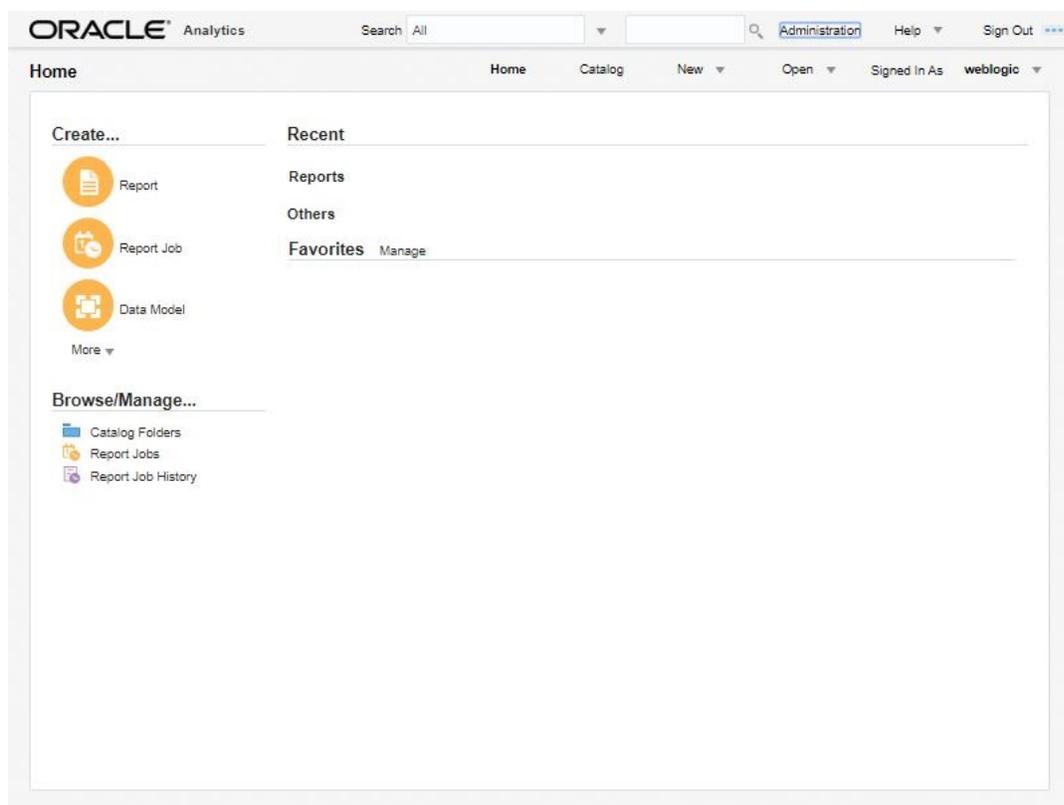
Figure 5-1 MDB Mail Server 1



2. Login using the valid credentials.

The following window is displayed.

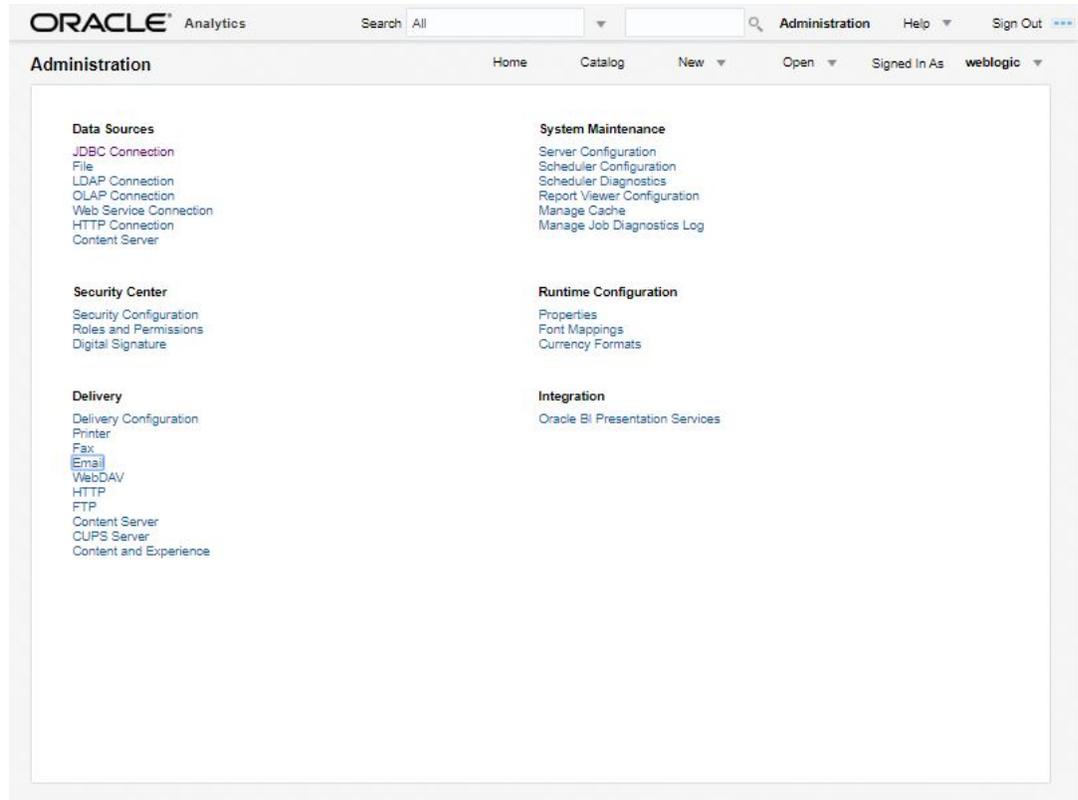
Figure 5-2 MDB Mail Server 2



3. Click **Administration**.

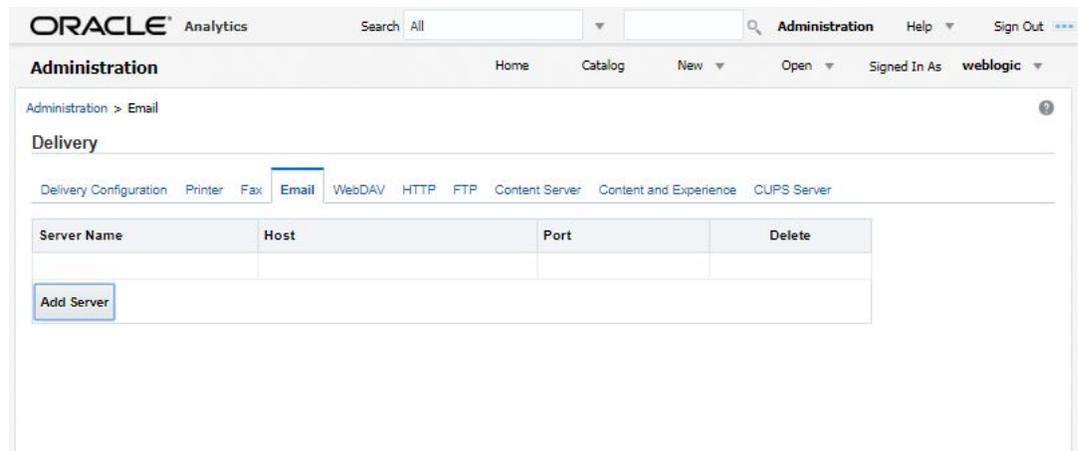
The following window is displayed.

Figure 5-3 MDB Mail Server 3



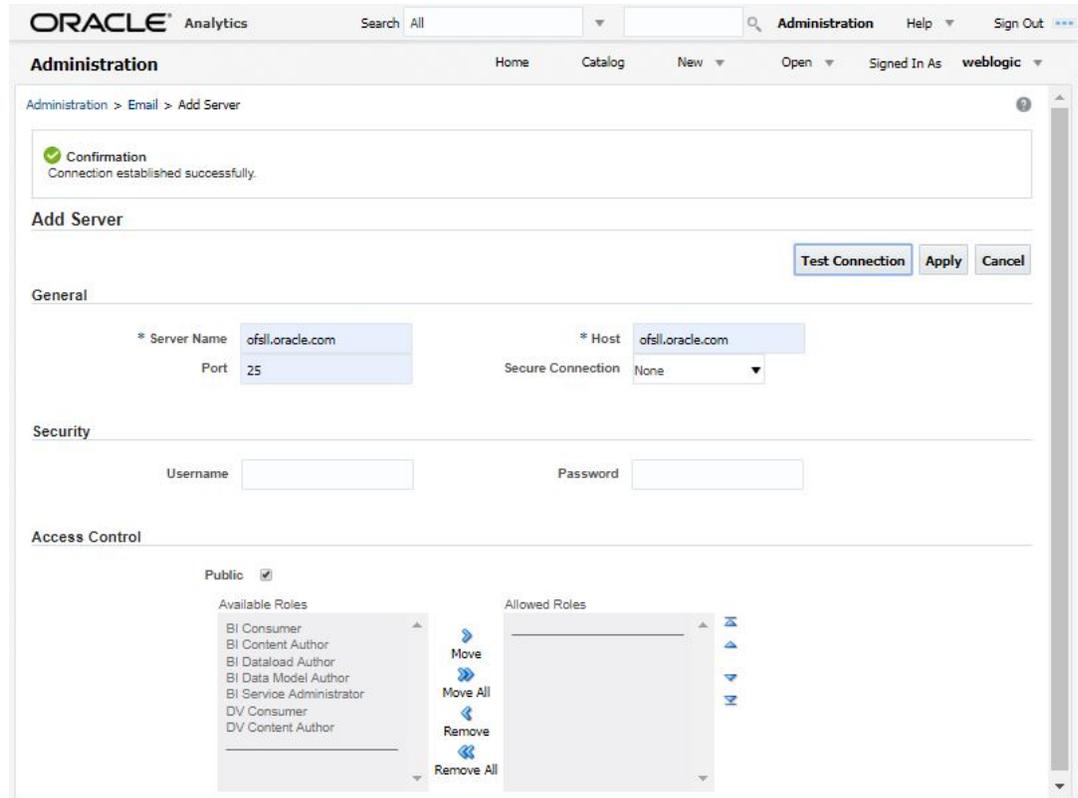
4. Click **Email**.
The following window is displayed.

Figure 5-4 MDB Mail Server 4



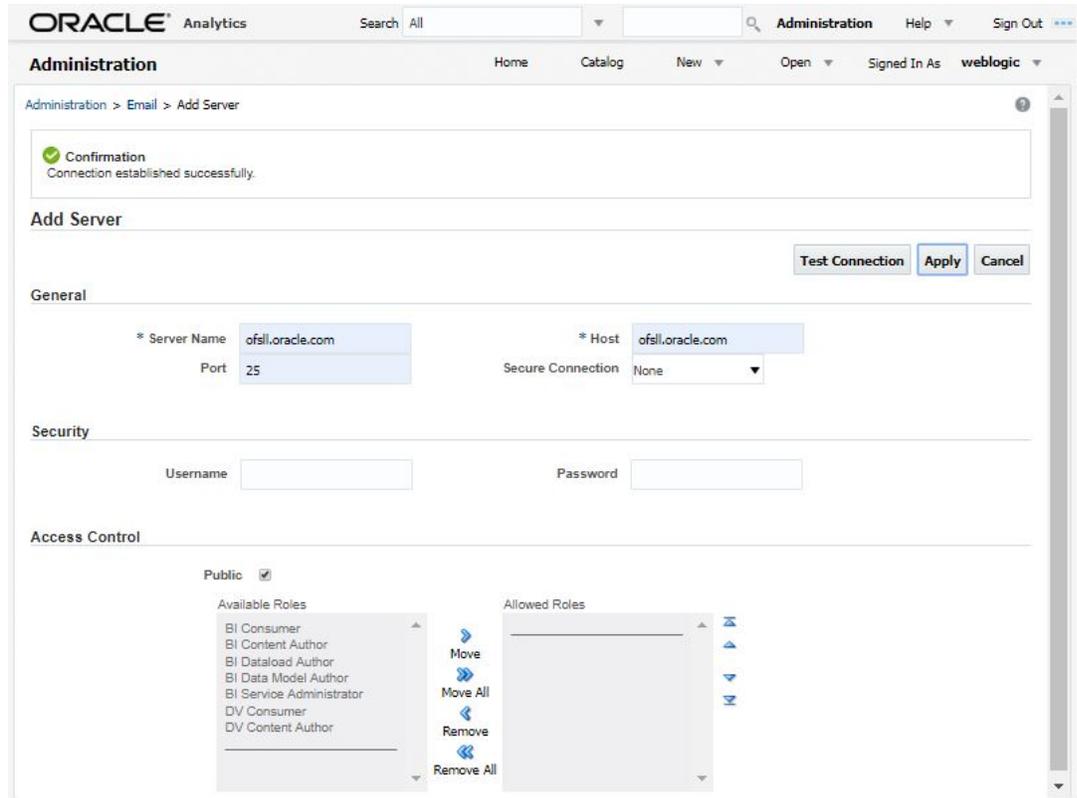
5. Click **Add Server**.
The following window is displayed.

Figure 5-5 MDB Mail Server 5



6. Specify the Server details (server name, host, and port number) and click **Test Connection**. On completion, a confirmation message is displayed as indicated.
7. Click **Apply**.
The following window is displayed.

Figure 5-6 MDB Mail Server 6



8. The MDB email server is successfully added as indicated.

Figure 5-7 MDB Mail Server 7

